



## INFORMATION SERVICES AND TECHNOLOGY POLICY

<b>SUBJECT:</b>	INFORMATION SERVICES AND TECHNOLOGY	<b>TITLE:</b>	PROJECT REQUEST AND EVALUATION		
<b>CATEGORY: Check One</b>	<b>Board of Trustees</b> <input type="checkbox"/>	<b>Presidential</b> <input type="checkbox"/>	<b>Functional</b> <input checked="" type="checkbox"/>	<b>School/Unit</b> <input type="checkbox"/>	
<b>Responsible Executive:</b>	Vice President for Information Services and Technology		<b>Responsible Office:</b>	Information Services and Technology	
<b>CODING:</b>		<b>ADOPTED:</b>		<b>AMENDED:</b>	
			<b>LAST REVIEWED:</b> xx/xx/xx		

### I. PURPOSE

This policy defines the process for requesting an IT service be initiated and the evaluation of those service requests that may result into an IT project.

### II. ACCOUNTABILITY

The Vice President of Information Services and Technology (IS&T), IS&T Director(s), and School/Unit IT Management shall ensure compliance with this policy.

### III. DEFINITION

**Business Project** – Any task specific endeavor undertaken to create a unique product or service with delineated starting and ending timeframes. The endeavor requires input and support from an IT department. The project may be initiated by a University business unit or IT department.

**Estimated Effort** – A delineated estimate of team/effort hours required to implement the project.

**IT** – Information Technology for all UMDNJ entities.

**IS&T** – Information Services and Technology for Central Administration.

**IT Management** – The group of individuals who are the head of their respective central administration area (i.e. BST, CST, PMO, OPS) or an individual school or unit (NJMS, SOM, RWJMS, UBHC, etc.) and attend the regularly scheduled IS&T leadership meetings held by the Chief Information Officer.

**IT Leaders** – The group of individuals who are leads for their respective central administration area (i.e. BST, CST, PMO, OPS) or an individual school or unit (NJMS, SOM, RWJMS, UBHC, etc.). This may be Asst. Directors, Managers, Analyst I, etc.

**PMO** – The central administration IS&T department, who sets the direction, monitors and provides training on how University personnel should successfully run projects.

**Project Methodology** – Defined by the Project Management Office, processes that provide a common set of guidelines and tools for all IT employees to successfully manage a project.

**Small Scale Project** – Typically, a small project is departmental in focus. This may include small organizational improvements or enhancements to current practices and/or procedures. Often this may include process improvement efforts, updates or minor enhancements to an existing information system or an incremental product development project. Small scale projects are those involving up to 500 hours of effort or less (IT, team members and stakeholder combined), and will have a smaller number of implementation team members.

**Medium Scale Project** – A medium project is often one conducted within an individual business unit. Medium projects typically involve implementing new capabilities to support key business function, and may include significant process improvement projects, systems enhancements or the development and implementation of new systems to support a single business function. There may be some procurement associated with the project, whether for products, services or resources. These projects are between 501 and 2000 hours of effort, and may have 10-15 implementation team members.

**Large Scale Project** – Large projects tend to be significant and strategic organizationally-driven projects. Large projects are usually aligned with the attainment of key strategic objectives of the organization, and will often have far reaching impact within the organization. These projects may require more extensive use of external consultants and contracting expertise, and will typically have much more complex procurement requirements. Large projects require over 2000 hours of effort, and likely involve increased size of the implementation teams – often with 30 or more team members.

#### **IV. REFERENCES**

IS&T PMO Project Methodology Processes document  
PMO Project Checklist  
Project Service Request Template  
Project Quality Review Policy

#### **V. APPLICABILITY**

This policy applies to all UMDNJ IT employees who are requesting or evaluating a business project.

#### **VI. POLICY**

##### **REQUIREMENTS:**

The work being requested must meet the criteria of a project, small, medium or large.

##### **RESPONSIBILITIES:**

Stakeholders (operational departments) as well as IT submit a Project Service Request (PSR) to the appropriate IT Department or the Project Management Office.

##### **EXCEPTIONS:**

Exceptions to this policy must be approved by the Vice President of IS&T.

##### **PROCEDURES:**

The Project Service Request will be analyzed and must be completed before an IT project can be proposed.

IT Representative evaluates the PSR and determines the preliminary effort hours and costs required by IT to complete the request. The effort hours and costs are only an estimate and will be further defined after the PSR has been approved as a project.

IT Representative reviews the PSR, including preliminary effort hours and costs, with the requestor. The requestor

determines if IT should proceed further with the approval process or close the request.

IT Representative reviews the PSR with the IT Management. The IT Management approves the PSR or requests modifications prior to approval.

IT Management logs project. When required, all stakeholders (the requestor and IT representative) should be prepared to individually or as a group support project request if a formal inquiry is requested.

The IT Management will assign a start date and communicate project initiation to the IT Representative. The IT Representative will communicate the project initiation to the requestor and commence the project following the PMO project methodology.

By Direction of the Vice President:

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(Denise Romano, Vice President and CIO)